



# eforms

National Self-Help Conference 'Sharing the Vision'

Albuquerque, NM Feb. 4-6, 2020



# Ice Breaker

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- Rural Development Staff Stand
  - <5 years sit
  - <10 years sit
  - Etc...
- Grantee Staff Stand
  - <5 years sit
  - <10 years sit
  - Etc...


# eForms Training Materials

**Field Office User Guide**  
How to Import the Single Family Housing Direct Loan Application Package into UniFi Using eForms

Monday, March 9, 2018

**Introduction**

The **Field Office User Guide** focuses on the steps required of field office user to import the Single Family Housing direct loan application package electronically into UniFi using eForms. If you have suggestions how we can improve this guide, please send us an email with your comments to: [SFHDIRECTPROGRAM@wdc.usda.gov](mailto:SFHDIRECTPROGRAM@wdc.usda.gov).

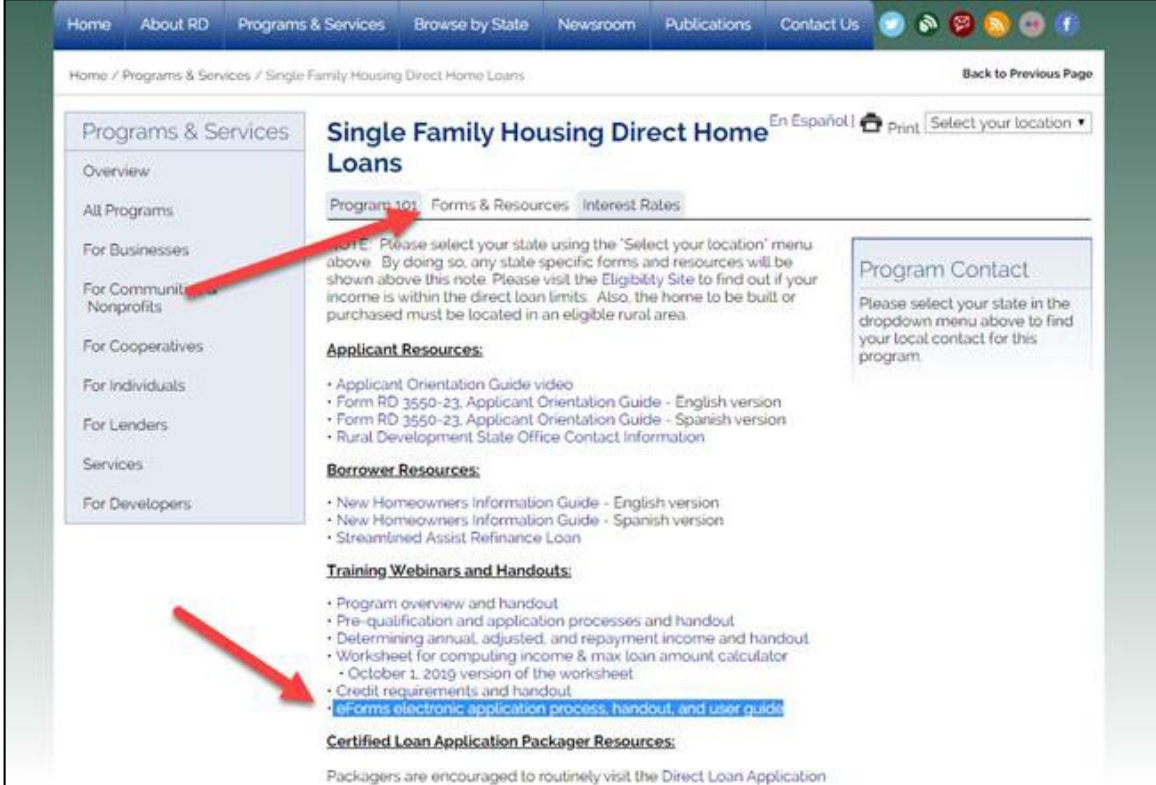
 Approved Intermediaries are required to submit applications electronically using the eForm system. To help them meet this requirement, each state must be prepared to accept and process applications using the eForms application. The first step towards establishing a working eForm application process is to establish a line of communication with intermediaries working in your state! We need to make sure our partners know who they will be working with and to reach out to with any questions or problems.

Please communicate any eForm issues or concerns to [SFHDIRECTPROGRAM@wdc.usda.gov](mailto:SFHDIRECTPROGRAM@wdc.usda.gov). This will help us improve the eForm experience for both our internal staff and partners,

Thank you,

The National Headquarters Direct Loan Program Staff

<https://www.rd.usda.gov/files/RD-SFH-eFormsUserGuideForIntermediaries.docx>



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**Programs & Services**

Overview

All Programs

For Businesses

For Communities/Nonprofits

For Cooperatives

For Individuals

For Lenders

Services

For Developers

**Single Family Housing Direct Home Loans**

Program 101 | Forms & Resources | Interest Rates

NOTE: Please select your state using the "Select your location" menu above. By doing so, any state-specific forms and resources will be shown above this note. Please visit the Eligibility Site to find out if your income is within the direct loan limits. Also, the home to be built or purchased must be located in an eligible rural area.

**Applicant Resources:**

- Applicant Orientation Guide video
- Form RD 3550-23, Applicant Orientation Guide - English version
- Form RD 3550-23, Applicant Orientation Guide - Spanish version
- Rural Development State Office Contact Information

**Borrower Resources:**

- New Homeowners Information Guide - English version
- New Homeowners Information Guide - Spanish version
- Streamlined Assist Refinance Loan

**Training Webinars and Handouts:**

- Program overview and handout
- Pre-qualification and application processes and handout
- Determining annual, adjusted, and repayment income and handout
- Worksheet for computing income & max loan amount, calculator
  - October 1, 2019 version of the worksheet
- Credit requirements and handout
- [eForms electronic application process, handout, and user guide](#)

**Certified Loan Application Packager Resources:**

Packagers are encouraged to routinely visit the Direct Loan Application

<https://www.rd.usda.gov/programs-services/single-family-housing-direct-home-loans>

The current *Field Office User Guide Document* and eForms recorded training posted to the USDA RD SFH Direct website both provide comprehensive views of the eForms process for staff and packagers.

# RD Staff Experience (1/3)

## Step 1: Email Received

**From:** [eFormsManager@one.usda.gov](mailto:eFormsManager@one.usda.gov) <[eFormsManager@one.usda.gov](mailto:eFormsManager@one.usda.gov)>  
**Sent:** Wednesday, January 8, 2020 2:05 PM  
**To:** [REDACTED]  
**Subject:** eForms Package 103479-010834278 Submittal

[REDACTED]

Package 103479-010834278 was submitted by Jamie Puckett on Wednesday, January 8th, 2020 at 2:04pm.

Click [here](#) to review this package.

Please do not respond to this email, as it was automatically generated by the eForms system.

eForms Automation

# RD Staff Experience (2/3)

## Step 2: Click Link to Take You to eForms

The screenshot shows the USDA Service Center eForms Administration homepage. The header includes the USDA logo and navigation links: Home, About eForms, Help, Contact Us, and Logoff. The breadcrumb trail reads "You are here: Home". The main content area displays a welcome message and an error notification in red text: "The following errors occurred: You must correct the following error(s) before proceeding: • The employee who logged in may not have sufficient privileges to see this package. • The link used to get to eFormsAdmin may reference an invalid package." Below the error, there is a message: "You may simply browse the forms or you may complete the forms online. Forms available on eForms are provided in Adobe Portable Document Format (PDF). To view these forms you need to download the free Adobe Reader, from Adobe Systems Inc." A left-hand navigation menu is visible with categories: eForms (Browse Forms), Workspace (Create Package, Saved Forms, Saved Packages), and Processing (Inbox, Outbox, Completed, Returned, Package Requests, Reports). The footer contains various links including USDA.gov, Farm Service Agency, Natural Resources Conservation Service, Rural Development, FOIA, Accessibility Statement, Privacy Policy, Non-Discrimination Statement, Information Quality, USA.gov, and White House.

## Step 3: Go to Your Inbox

The screenshot shows the USDA Service Center eForms Administration inbox page. The header includes the USDA logo and navigation links: Home, About eForms, Help, Contact Us, and Logoff. The breadcrumb trail reads "You are here: Home / Inbox". The main content area features a green header for "Inbox" and a message: "Please click on confirmation number to open package." Below this is a table with columns: Confirmation Number, Package Originator, Status, and Process Date. The table content is empty, with a message below it stating: "You currently do not have any inbox packages." A left-hand navigation menu is visible with categories: eForms (Browse Forms), Workspace (Create Package, Saved Forms, Saved Packages), Processing (Inbox, Outbox, Completed, Returned, Package Requests, Reports). The footer contains various links including USDA.gov, Farm Service Agency, Natural Resources Conservation Service, Rural Development, FOIA, Accessibility Statement, Privacy Policy, Non-Discrimination Statement, Information Quality, USA.gov, and White House.

# RD Staff Experience (3/3)

## Step 4: Show Files

USDA United States Department of Agriculture  
Service Center eForms Administration

Home About eForms Help Contact Us Logoff

You are here: Home / Completed

### Completed

Please click on confirmation number to open package.

Confirmation Number	Package Originator	PIN Number	Status
101035-081725669	Johnson, Sarah		Accepted
101035-051129263	Puckett, Jamie		Accepted
102001-101832078	Puckett, Jamie		Accepted
102001-120532274	Mullins, Kodie		Accepted
102001-120532276	Mullins, Kodie		Accepted
101035-012832375	Puckett, Jamie		Accepted
101035-021932497	Puckett, Jamie		Accepted
101035-042532953	Belcher, Angela		Accepted

USDA.gov | Farm Service Agency | Natural Resources Conservation Service | Rural Development  
FOIA | Accessibility Statement | Privacy Policy | Non-Discrimination Statement | Information Quality | USA.gov | White House

## Step 5: eForms!

USDA United States Department of Agriculture  
Service Center eForms Administration

Home About eForms Help Contact Us Logoff

You are here: Home / Completed / Items

### Completed

These are the forms that are contained by package **101035-042532953**.

Name	Status	Last Updated	Actions
Package.pdf	Active	04/29/2019	
RD 410-4	Active	04/29/2019	

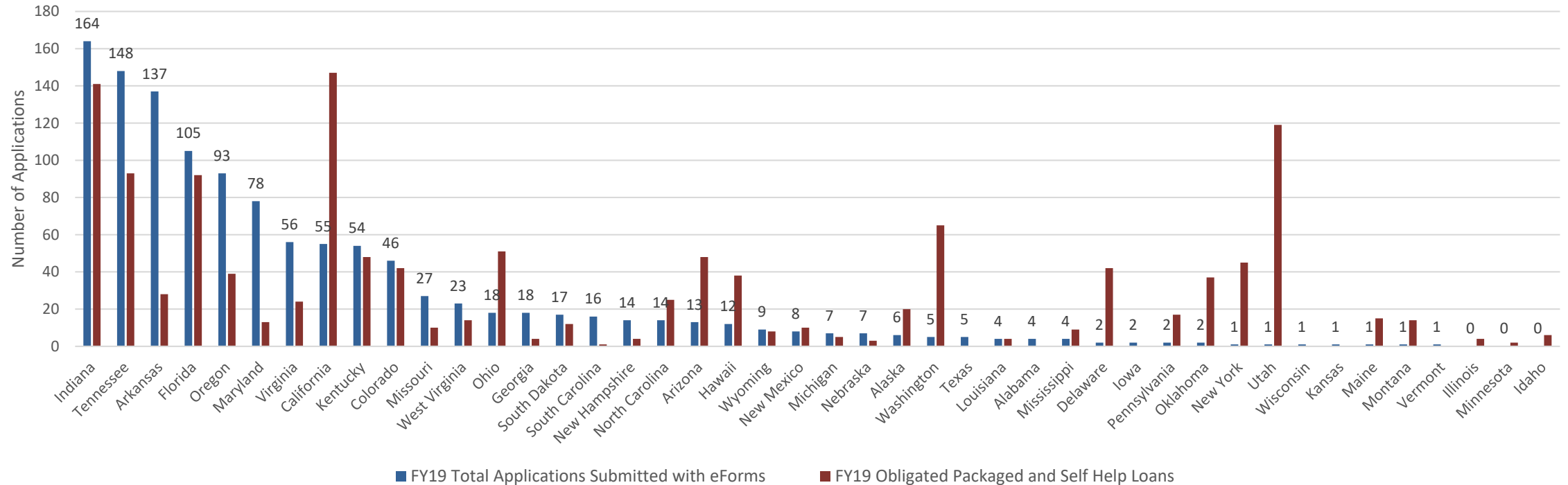
Comments Notes Reasons History Close

USDA.gov | Farm Service Agency | Natural Resources Conservation Service | Rural Development  
FOIA | Accessibility Statement | Privacy Policy | Non-Discrimination Statement | Information Quality | USA.gov | White House

# Adoption of eForms vs Packaged and Self-Help Loans | FY19 eForms Data

Please note that withdrawn/denied packaged and self help applications are not represented on this chart due to unavailable data. States not in this graph had zero applications submitted with eForms and zero packaged and self help loans in FY19.

FY19 Number of 502/504 Applications Submitted with eForms Compared to Number of FY19 Obligated Packaged and Self Help Loans



**There were 1,182 applications (410-4 packages) submitted using eForms in FY19.**

# Increase Adoption of eForms | Action Plan

Using eForms saves about ~30 minutes per application, enables better application tracking through a centralized intake system, and allows supervisors to understand their backlogs and current application volume.



## STEP ONE: TRAINING/EDUCATION

- Promote eForms training on February SFH monthly teleconference
- Host four smaller regional eForms trainings
- Market eForms training during February Self-Help conference
- Look into marketing eForms at packager training

## STEP TWO: MARKETING

- Publish a story on eForms in the packager newsletter (especially for intermediaries and non-certified packagers)
- Encourage SFH staff to invite their partners to their office to learn about eForms
- Promote eForms trainings on RD state websites

## STEP THREE: PROGRAM REQUIREMENTS

- Require use of eForms from:
  - Non-certified packagers (where USDA is financing the packager fee)
  - Self Help Grantees
- Encourage use of eForms from:
  - Realtors
  - Other community partners



# Andria and Andrea 2015 Self-Help conference





Rural Development

U.S. DEPARTMENT OF AGRICULTURE